



2019 Arts & Culture Monitor Survey Report

Prepared for:

Department of Local Government, Sport and Cultural Industries

Prepared by:

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1 Executive Summary

Arts and culture continues to be considered important.

85% agree

the Western Australian Government should invest in arts and culture to ensure they are available to the public

95% agree

it is important for school children to have access to arts and culture as part of their education

Perceptions of individual and community value have increased slightly over the past year.

When asked 'how valuable is the role of arts and culture in your life?', the Value Index Score is 66.

- This is the highest rating to date and up from 60 in 2016.
- Perceptions of individual value are lower among males and those with lower levels of education. Regionally, perceived value is lowest in Goldfields-Esperance.
- Individual value is highest among females, people with a diploma and postgraduate level education and residents in the Western Suburbs and Inner North metropolitan area.

Arts and culture is seen to have a valuable role in the community with a Value Index Score of 77.

- This is the highest score over the past 11 years.
- Perceptions of community value are highest among people living in the Western Suburbs.
- Regionally, community value is higher in the Kimberley, Pilbara and Peel regions and lower in the Goldfields-Esperance region.

Most people believe the arts benefits the broader community, not just those who participate.

Only 21% agree that "the arts only helps those people who participate, not the broader community".

- Results have remained relatively steady over recent years.
- Kimberley and Pilbara respondents are most likely to recognise the broader community benefits, respondents in Goldfields-Esperance appear least likely to.

Most believe arts and culture contributes to WA's sense of community and identity.

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?', the Value Index Score is 73, an increase of 5 index points over the past two years.

- The Value Index Score is higher among people living in the Western Suburbs, females, those with diploma and post-graduate level education, Aboriginal and Torres Strait Islander people and residents in the Pilbara, Kimberley and Peel regions.

When asked 'how valuable is the contribution of arts and culture to the identity of the state?', the Value Index Score is 74, up 6 index points since 2016.

- The Value Index score is highest among low income earners, residents in the Western Suburbs and in the Peel and Pilbara regions.

The arts continue to make people feel good.

The Agreement Index Score is 77; slightly higher than all previous years.

- Level of agreement is greatest among females, people with higher levels of education, those who speak a language other than English at home and residents in the Inner North and Western Suburbs.
- Perceptions vary across the regions, with strongest agreement in the Kimberley and Pilbara and lowest agreement in Goldfields-Esperance.

Perceived ease of accessing arts and culture continues to increase gradually.

The Ease of Access Index Score is 66, steadily climbing from 53 in 2012.

- 58% feel it is easy to access or participate in arts and cultural activities in WA.

- Ease of access is highest in the Western Suburbs and tends to improve with level of household income.
- Ease of access is lower among people with a disability or impairment and Aboriginal and Torres Strait Islander people, and continues to be most difficult for people living in regional WA, especially those in the Wheatbelt, Kimberley and Goldfields-Esperance.

Attendance or participation in the arts is improving.

82% of respondents have attended or participated in an arts and cultural activity over the past 12 months; up from 75% in 2018 and level with the previous high in 2014.

- 47% of respondents attended or participated in at least three arts and cultural activities over summer and 72% of respondents attended or participated in at least one; up from 39% and 65% respectively in 2018. Non-attendance or participation over the past 2 years has remained at 15%, on par with 2018.

Level of participation varies across the community.

- Frequent participation (attended 3 or more times over summer) is more common among Western Suburbs residents, those with higher levels of education, those on higher incomes and Aboriginal and Torres Strait Islander people.
- Non-attendance is more common among low income earners and those with lower levels of education.

Interest in content and fun are the main motivators for participating in arts and cultural activities.

The top four reasons for participating in arts and cultural activities are an interest in the content, to have fun, to experience new things and to interact with friends and family.

- While an interest in the content is the primary motivator for people over 35 years, fun is the primary motivator for younger adults.
- Parents with young children (aged 0-5 years) are mainly motivated by experiencing new things, interacting with friends and family and having fun.

Government and corporate support is considered to be essential for the arts. More funding is wanted.

Only 16% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”.

77% of respondents would be prepared to contribute more money to expand provision of and access to arts and culture.

- 52% of respondents believe \$2.21 per person per week is too low as an allocation for arts and culture.
- 44% would be prepared to pay more than \$2 extra per person per week. The proportion of respondents willing to do this has been steadily increasing since 2016.
- Support for higher funding is greatest among people of Aboriginal and Torres Strait Islander background. This group is more willing to pay from \$2.01 to \$10+ more per person per week.
- Support is also higher among respondents from inner metropolitan areas.

Perceived value of the WA film and television industry has increased over the past 4 years.

74% of respondents rate the industry highly.

- The Value Index Score is 76, up 4 index points from 2018 and 7 index points from 2016.
- Perceived value is highest among older adults, low income earners and people in the Western Suburbs.
- It is valued by both metropolitan and regional respondents.

Perceived access to WA film and TV has dropped since 2017.

38% of respondents consider it to be easy to access WA produced film and television productions.

- The Ease of Access Index Score is 53. While up 2 index points from 2018 it continues to be down from a high of 61 in 2017.
- Ease of access is lowest in the Wheatbelt and Gascoyne regions.

2 Strategic Insights

1. **Increase Government investment in arts and culture.** The arts are highly valued and 52% of the community believes an allocation of \$2.21 per person by the State Government is too low. This perception has remained consistent over the past 5 years.
2. As corporate giving is considered essential for the arts, **promote the benefits of arts sponsorships to attract more corporate support.** Seek greater support from highly engaged segments of the community including the highly educated, higher income earners and those in the Western Suburbs and Inner North.
3. **Continue to support arts and culture as being accessible for children through their education.** 95% of respondents agree that this access is important.
4. **Continue to boost perceptions of the value of arts and culture for individuals and the broader community.** There has been an upward trend over the past year as more respondents agree that the arts have broad community benefit, it makes people feel good and strengthens the sense of community and identity.
5. Attendance at arts events appears to have increased again over the past 12 months. **Continue to boost attendance and participation in the arts.** Consider strategies that incorporate the main motivations including interesting content, fun, new experiences and interactions with friends and family.
6. Perceived value of **WA film and television** productions are on the rise. Continue to support and promote this work.
7. Investigate how to improve **ease of access and participation for people with a disability or impairment and Aboriginal and Torres Islander people.** Both groups regard personal and community value of arts and culture to be high.
8. **Overall, access to arts and culture across regional WA** continues to be limited compared to metropolitan areas. Explore ways to increase regional participation especially in the Goldfields-Esperance, Kimberley and Wheatbelt regions.
9. Develop strategies to capitalise on the **high perceived value of arts and culture identified in the Kimberley, Peel and Pilbara regions.**

3 The Study

3.1 Summary

Culture and the Arts WA (formerly the Department of Culture and the Arts (DCA), which now forms part of the Department of Local Government, Sports and Cultural Industries (DLGSC)), has conducted an annual Arts and Culture Monitor to track behaviour and attitudes towards arts and culture since 2003. The study assists DLGSC with KPI performance evaluation and strategic planning.

Consistent with previous years, the study was conducted using a self-completion, online survey.

22,658 online panelists from Thinkfield were randomly selected and invited to complete an online survey between 7 May and 4 June 2019. Quotas were set by age, gender and location to aim to achieve a representative cross section of the community. The final sample was weighted by age, gender and location to match the ABS population profile for Western Australia.

1,317 respondents completed a survey. The overall sampling error was reduced to $\pm 2.7\%$ at the 95% confidence interval. In effect, if the survey result is 50%, we would expect the population result to be between 47.3% and 52.7%. As the survey result moves towards 0% or 100%, the sampling error reduces.

Table 1: Summary of the study			
Strategic Purpose	To monitor behaviour and attitudes towards arts and culture.		
Data collection type	Self completion, online survey		
Data collection dates	7 May 2019 – 4 June 2019		
Sample source	Thinkfield Online Panel		
Total invited	22,658		
Open Rate (# opened)	21% (4770)		
Sample Size - # completed	1317		
Response rate*	28%		
Sampling error	$\pm 2.7\%$ at the 95% C.I.		
Quotas	By age, gender and location to match the population profile		
Weighting by age and gender to be representative of the general population		Male	Female
	17-34	0.942	0.916
	35-54	1.161	1.070
	55+	1.021	0.923

Table 1: Summary of the study (continued)

Weighting by region to be representative of the general population		WA Population
	Gascoyne	0.163
	Goldfields-Esperance	0.612
	Great Southern	0.657
	Kimberley	0.611
	Mid West	0.423
	Peel	1.053
	Pilbara	0.882
	South West	0.842
	Wheatbelt	0.892
	Perth	1.160

**The response rate is calculated by the number of people who completed a survey divided by the number of people who opened an email invitation.*

Data has been analysed using SPSS.

Please note: throughout this report where sub-totals add to $\pm 1\%$ of the parts, this is due to rounding errors to zero decimal places.

3.2 Sample Profile

The study attracted a diverse and representative group of residents across Western Australia by the following classifications (as shown in Figure 1):

Gender

47% of respondents were male, 52% were female and 1% answered indeterminate.

Age

33% of respondents were aged 17-34 years, 32% were aged 35-54 years and 35% were over 55 years.

Lifestage

40% of respondents had at least one child living at home. 58% of respondents did not have children living at home. This includes single person households, group households, couples without children and empty nesters. 2% refused to answer.

Highest level of education attained

29% of respondents had a high school leaving certificate as their highest level of education, 23% had a diploma or advanced diploma, and 37% had a Bachelor Degree or higher. Around 11% answered 'other' or refused to answer.

Household income

44% of respondents had a combined household income before tax of up to \$75,000 and 45% were earning over \$75,000. 11% of respondents refused to provide this information.

Disability

14% of respondents live in a household where they or someone they live with is affected by a disability or impairment.

Ethnic diversity

32% of respondents live in a household where they or someone they live with was born overseas, 7% live in a household where they or someone they live with mainly speaks a language other than English (LOTE) at home and 3% live in a household where they or someone they live with identifies as being an Aboriginal or Torres Strait Islander Person.

Location

36% of respondents live in regional WA and 64% live in the Greater Perth Metropolitan area. Postcodes were grouped as follows:

Western Suburbs:	6008-6015
Inner North:	6000-6007; 6016-6019; 6021; 6029; 6050-6053; 6059-6062
Inner South:	6100-6105; 6151-6154; 6156-6160
Outer North:	6020; 6022-6028; 6030-6038; 6041; 6044; 6054-6058; 6063-6090
Outer South:	6106-6150; 6155; 6162-6199
Regional WA:	6200-6999

This year, Culture and the Arts WA wanted to attract greater representation across the ten regions of Western Australia. Map 1 details the regions.

Map 1: Regions of Western Australia

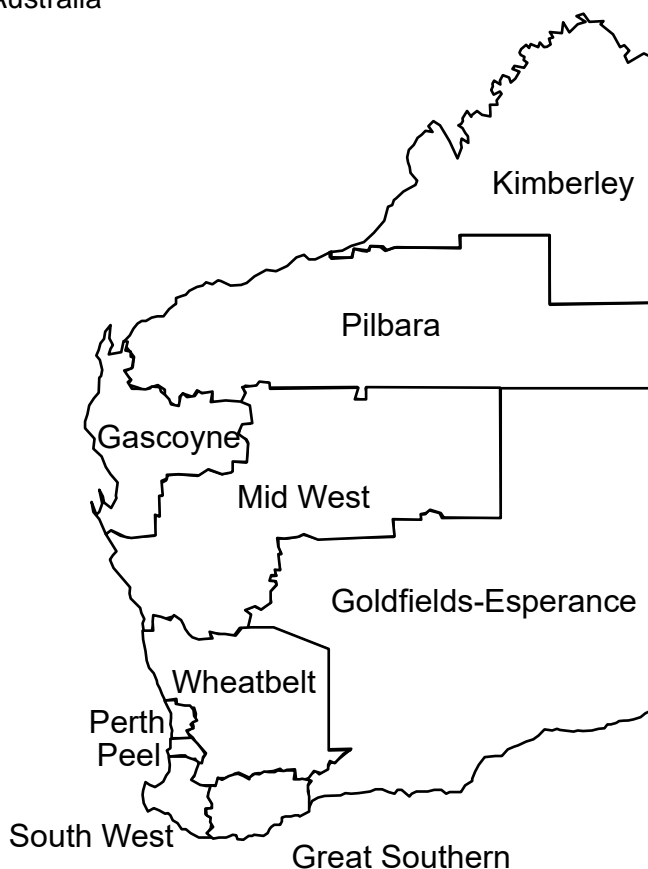
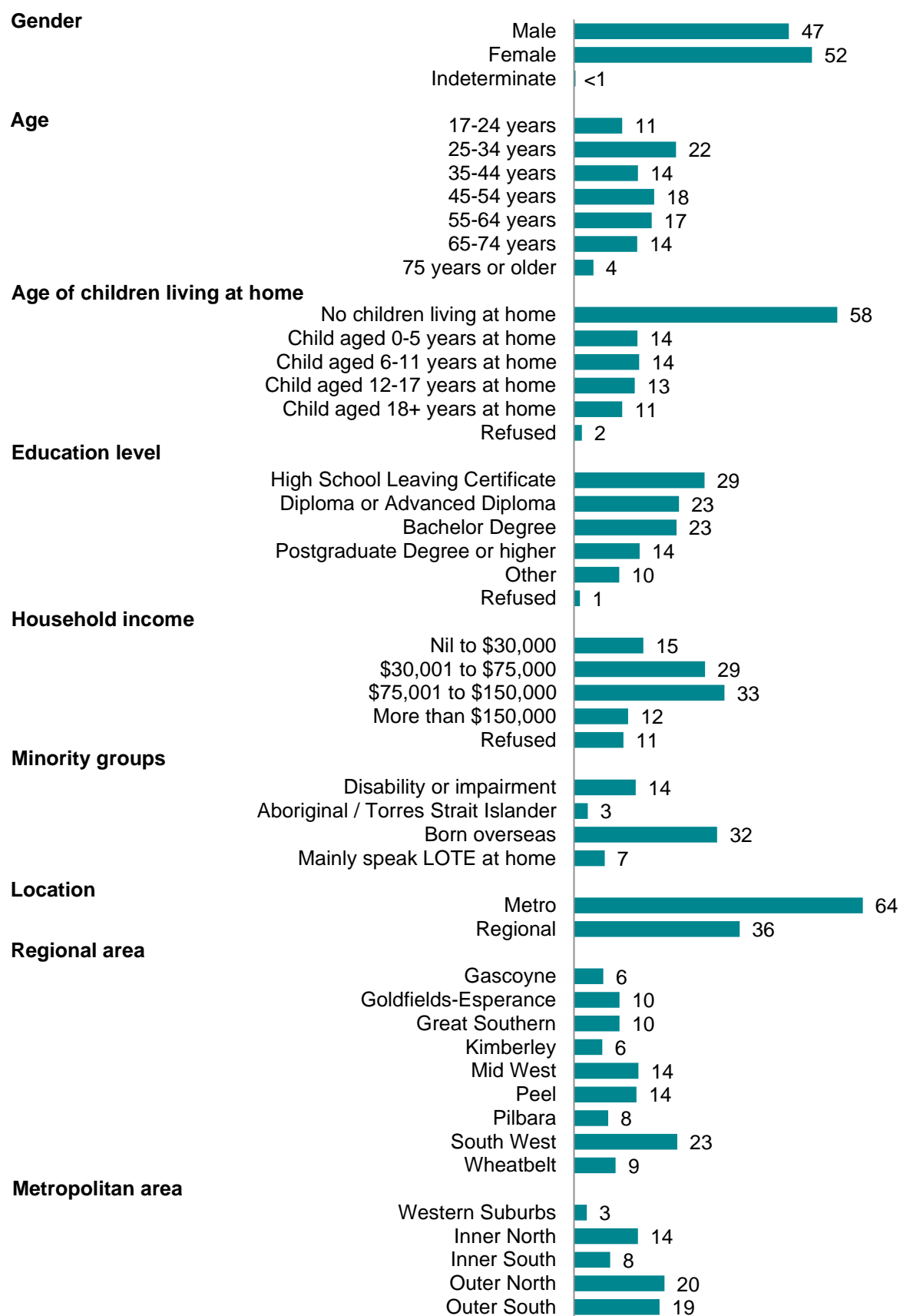


Figure 1: Sample Profile
% respondents, unweighted



SURVEY FINDINGS

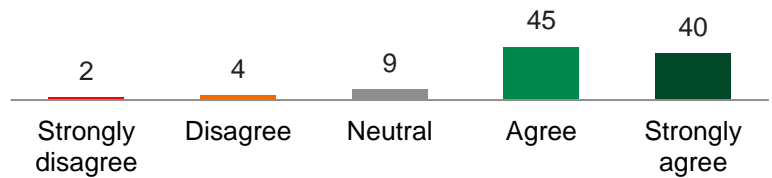
4 The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public

4.1 Level of Agreement

85% of respondents agree or strongly agree with the statement “The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public” (see Figure 2).

The mean score is 4.2 out of 5.0 and the Agreement Index Score is 79 out of 100.

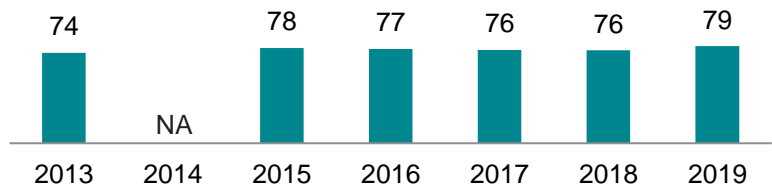
Figure 2: Overall Ratings
% of respondents



4.2 Trend Analysis

The Agreement Index Score is the highest score to date and has remained relatively steady over the past five studies (see Figure 3).

Figure 3: Trend Analysis
Agreement Index Score

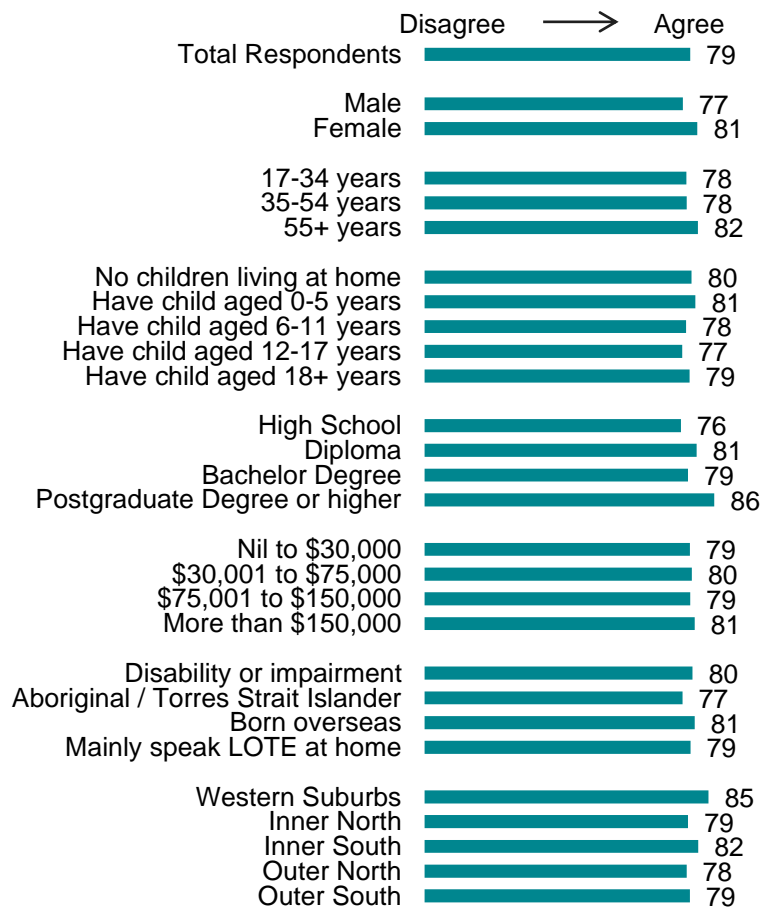


4.3 Community Variances

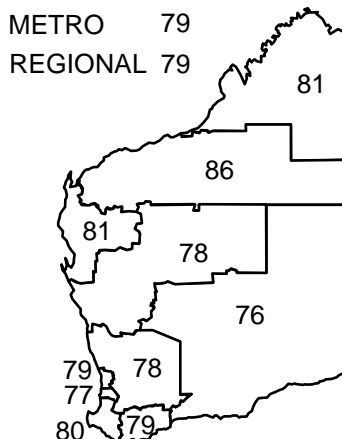
The Agreement Index Score is consistently high across the community with the highest scores among people with a higher level of education and those living in the Western Suburbs (see Figure 4).

Across the regions, those in the Pilbara are most likely to agree that the WA Government should invest in arts and cultural activities (see Map 2).

Figure 4: Community Variances
Agreement Index Score



Map 2: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public.
Base: All respondents, excludes unsure (n = 1284) NB: 2% of all respondents answered 'unsure'

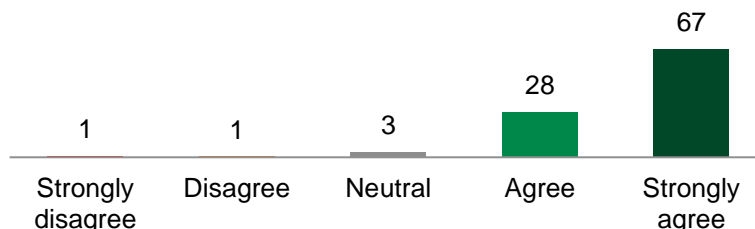
5 It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education

5.1 Level of Agreement

95% of respondents agree or strongly agree with the statement “it is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education” (see Figure 5).

The mean score is 4.6 out of 5.0 and the Agreement Index Score is 90 out of 100.

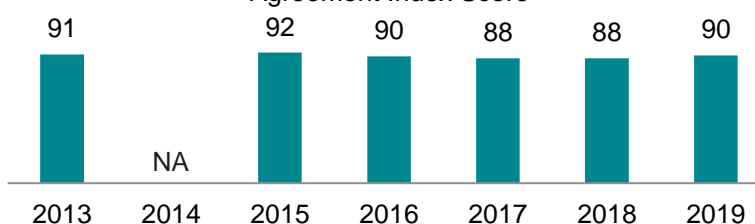
Figure 5: Overall Ratings
% of respondents



5.2 Trend Analysis

The Agreement Index Score has remained high and steady over recent years (see Figure 6).

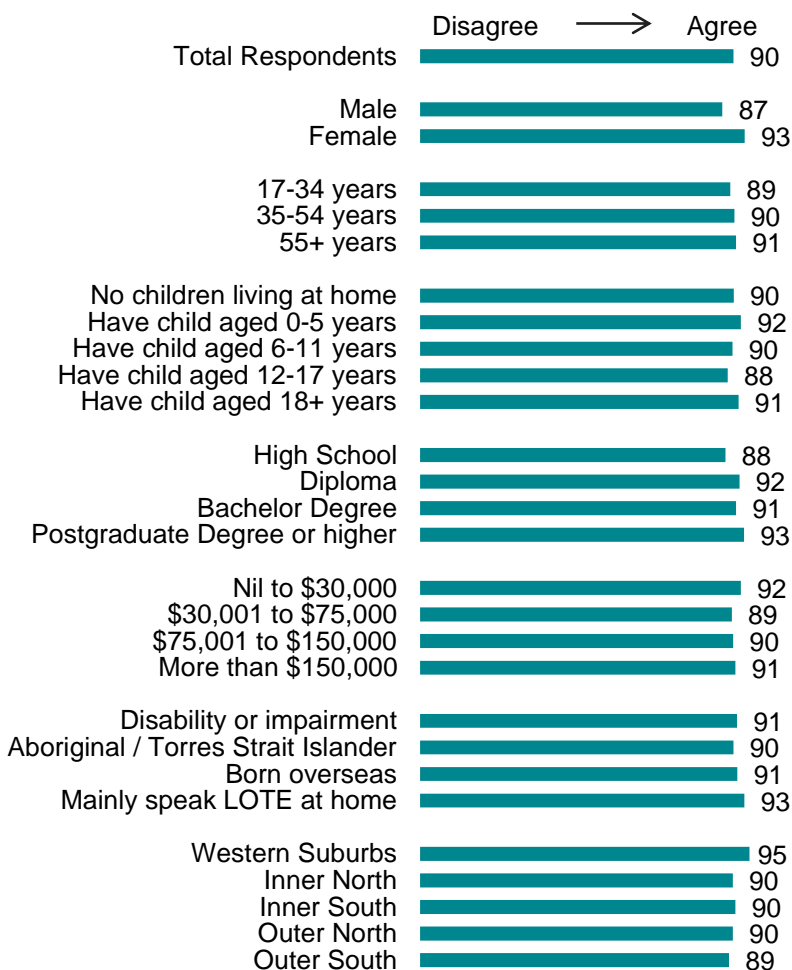
Figure 6: Trend Analysis
Agreement Index Score



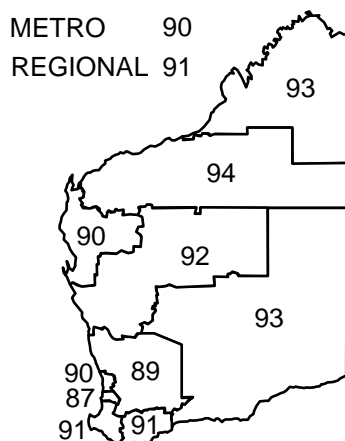
5.3 Community Variances

The Agreement Index Score is consistently high across the community (see Figure 7) and across regional areas (see Map 3).

Figure 7: Community Variances
Agreement Index Score



Map 3: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education. Base: All respondents, excludes unsure (n = 1300) NB: 1% of all respondents answered 'unsure'

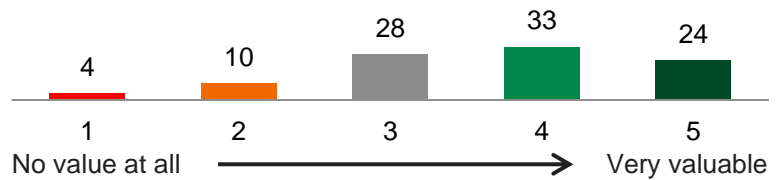
6 Perceived value of arts and culture for individuals

6.1 Overall Ratings

When asked 'how valuable is the role of arts and culture in your life?' 57% of respondents rate value highly (see Figure 8).

The mean score is 3.6 out of 5.0 and the Index Score is 66 out of 100.

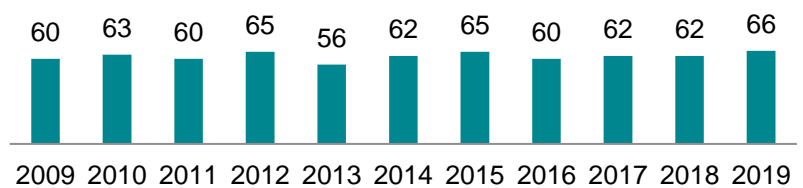
Figure 8: Overall Ratings
% of respondents



6.2 Trend Analysis

At 66, the Value Index Score is the highest rating to date and has increased from 60 in 2016. The lowest rating was 56 in 2013 (see Figure 9).

Figure 9: Trend Analysis
Value Index Score

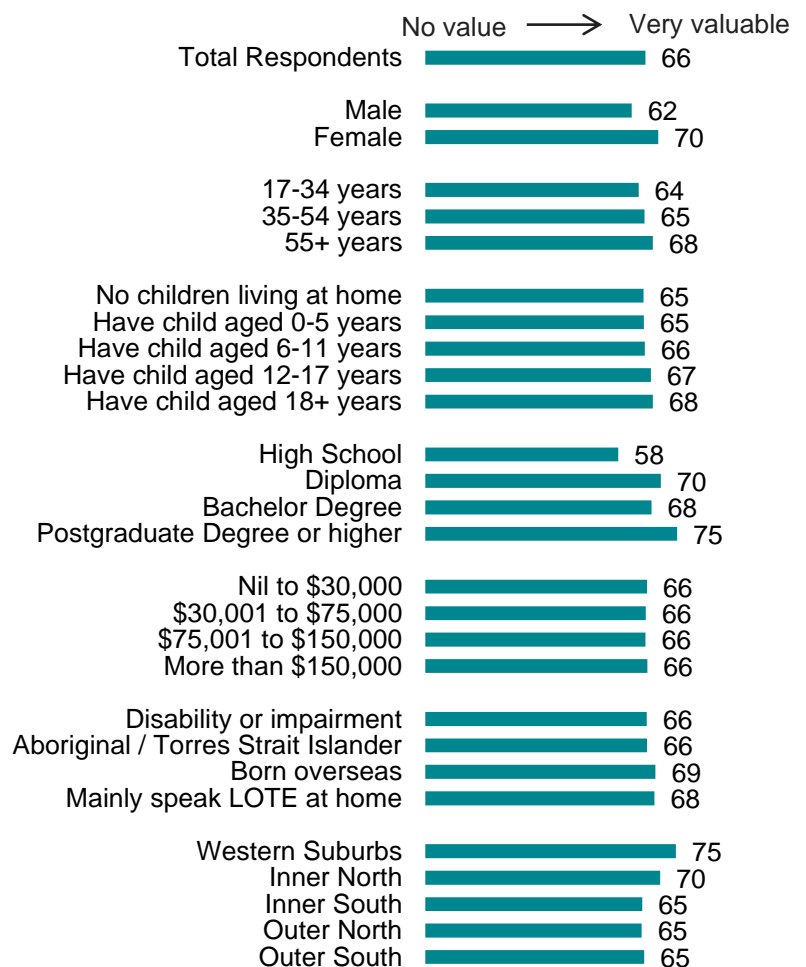


6.3 Community Variances

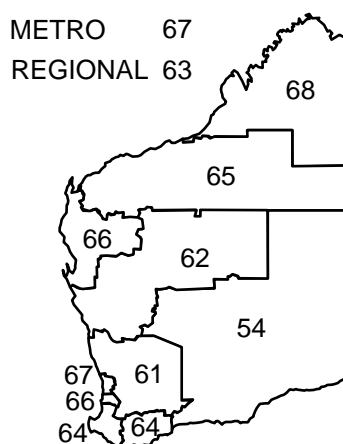
Perceived value is higher among females, those with diploma and postgraduate level education and people who live in the Western Suburbs and Inner North.

Perceived value is lowest among males and those with high school level education (see Figure 10). Regionally, it is lowest among respondents in Goldfields-Esperance (see Map 4).

Figure 10: Community Variances
Value Index Score



Map 4: Regional Variances
Value Index Score



Q4b. How valuable is the role of arts and culture in your life?

Base: All respondents, excludes unsure (n = 1291) NB: 2% of all respondents answered 'unsure'

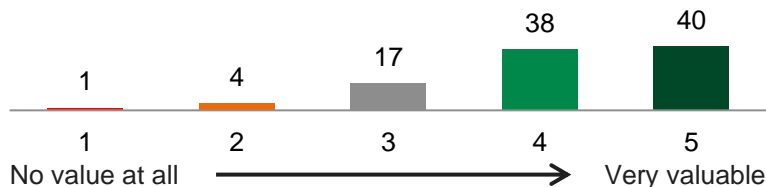
7 Perceived value of arts and culture for the community

7.1 Overall Ratings

When asked 'how valuable do you think the role of arts and culture is in the community?' 77% of respondents rate value highly (see Figure 11).

The mean score is 4.1 out of 5.0 and the Index Score is 77 out of 100.

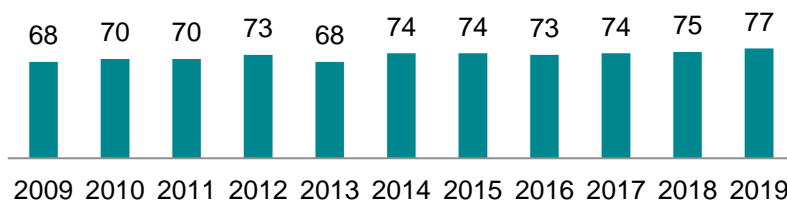
Figure 11: Overall Ratings
% of respondents



7.2 Trend Analysis

At 77, the Value Index Score is the highest score achieved over the past 11 years (see Figure 12).

Figure 12: Trend Analysis
Value Index Score

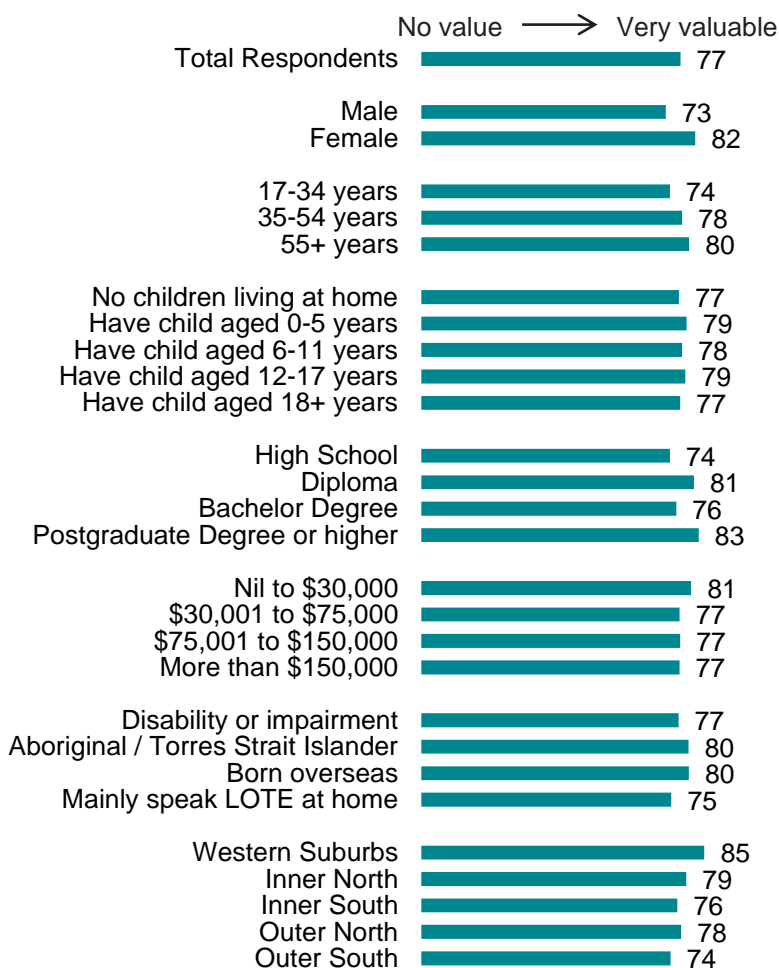


7.3 Community Variances

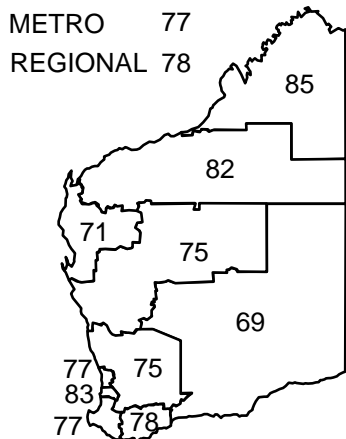
While relatively consistent across the community, perceived value is highest among females, those with diploma and postgraduate level education, lower income earners and people living in the Western Suburbs (see Figure 13).

Across the regions, there is greatest room to improve perceived value in the Goldfields-Esperance region (see Map 5).

Figure 13: Community Variances
Value Index Score



Map 5: Regional Variances
Value Index Score



Q4c. How valuable do you think the role of arts and culture is in the community?

Base: All respondents, excludes unsure (n = 1292) NB: 2% of all respondents answered 'unsure'

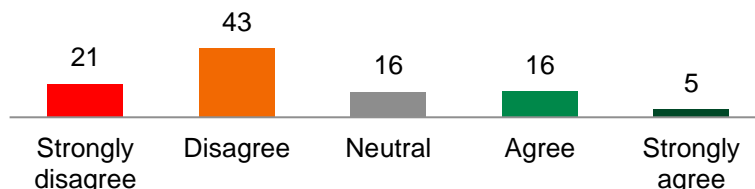
8 The arts only helps those people who participate, not the broader community

8.1 Level of Agreement

Only 21% of respondents agree “the arts only helps those people who participate, not the broader community”. 79% feel neutral or disagree with the statement (see Figure 14).

The mean score is 2.4 out of 5.0 and the Index Score is 35 out of 100.

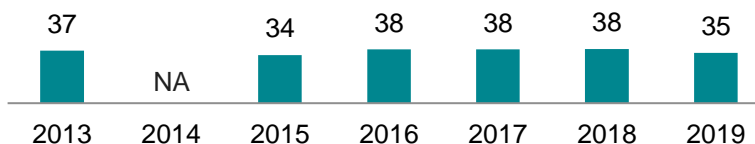
Figure 14: Overall Ratings
% of respondents



8.2 Trend Analysis

The Agreement Index Score remains fairly consistent with recent years. It has ranged between 34 and 38 over the past 6 studies (see Figure 15).

Figure 15: Trend Analysis
Agreement Index Score

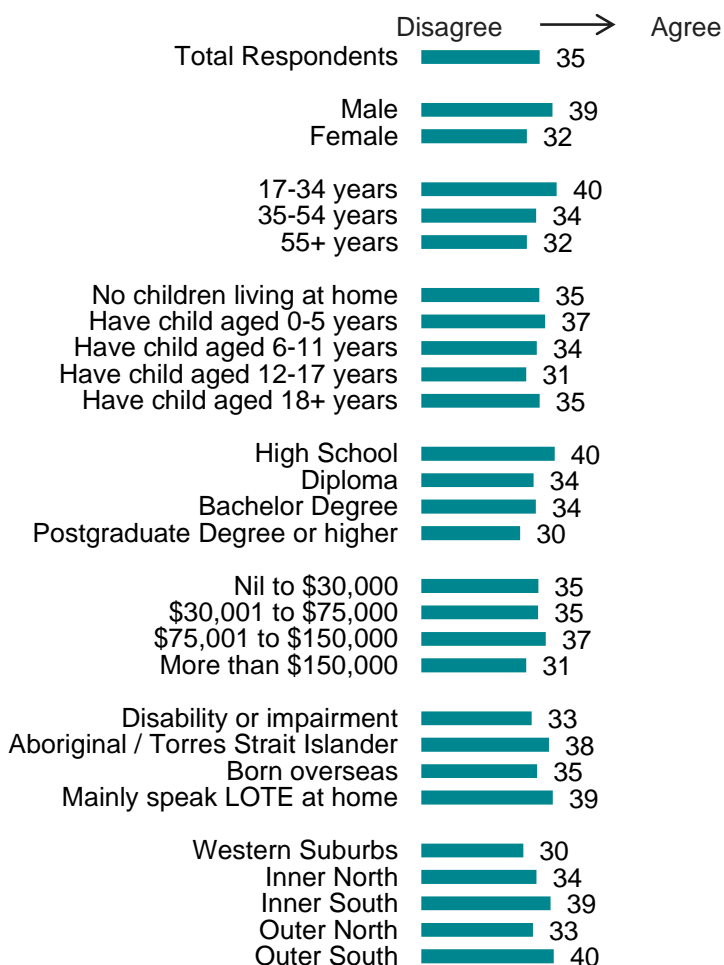


8.3 Community Variances

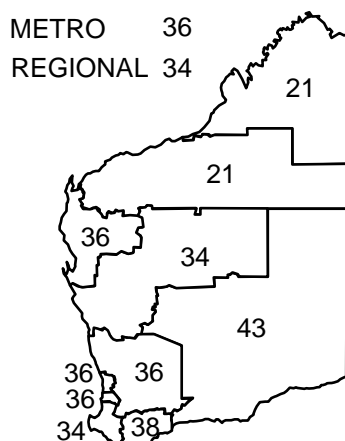
People with higher levels of education and those living in the Western Suburbs are more likely to disagree while younger adults, high school educated and people living in the Outer South appear more likely to agree (see Figure 16).

Perceptions vary across the regions. The Agreement Index Score is lowest in the Kimberley and Pilbara and highest in Goldfields-Esperance (see Map 6).

Figure 16: Community Variances
Agreement Index Score



Map 6: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? The arts only helps those people who participate, not the broader community.

Base: All respondents, excludes unsure (n = 1264) NB: 4% of all respondents answered 'unsure'

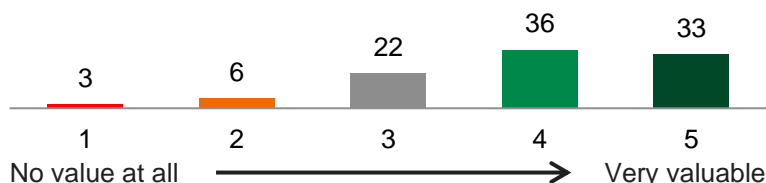
9 Value of arts and culture's contribution to creating a sense of community in WA

9.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to your sense of community in WA?' 70% of respondents rate value highly (see Figure 17).

The mean score 3.9 out of 5.0 and the Index Score is 73 out of 100.

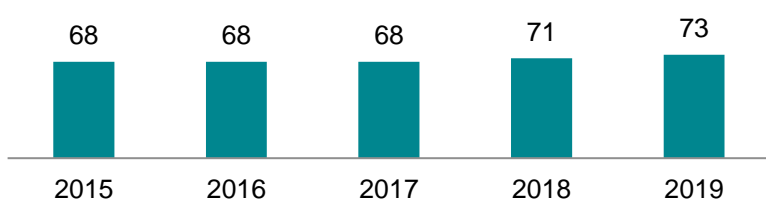
Figure 17: Overall Ratings
% of respondents



9.2 Trend Analysis

At 73, the Value Index Score is the highest score achieved and has increased by 5 index points over the past 2 years (see Figure 18).

Figure 18: Trend Analysis
Value Index Score

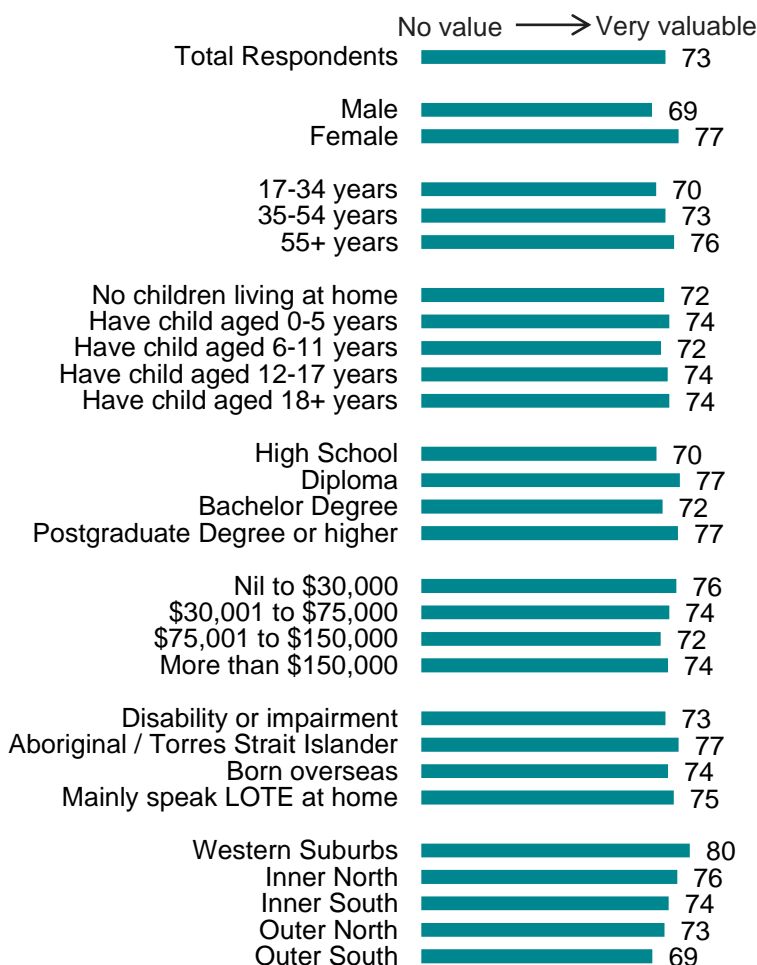


9.3 Community Variances

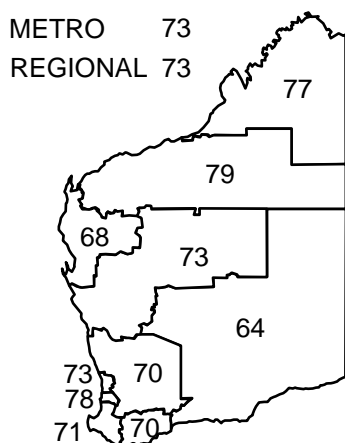
Perceived value is highest among people in the Western Suburbs. It is also higher among females, those with diploma and postgraduate level education and Aboriginal and Torres Strait Islander people. It is lowest among males and people living in the Outer South (see Figure 19).

Perceived value is highest in the Pilbara and Peel and lowest in Goldfields-Esperance and the Gascoyne (see map 7).

Figure 19: Community Variances
Value Index Score



Map 7: Regional Variances
Value Index Score



Q5a. How valuable is the contribution of arts and culture to your sense of community in WA?

Base: All respondents, excludes unsure (n = 1256) NB: 5% of all respondents answered 'unsure'

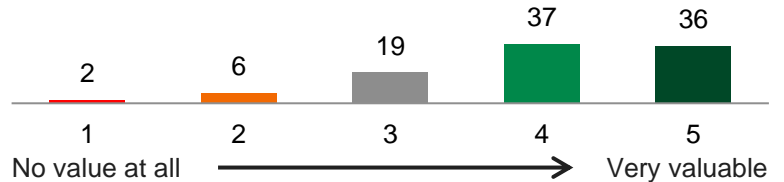
10 Value of arts and culture's contribution to creating a sense of identity in WA

10.1 Overall Ratings

When asked 'how valuable is the contribution of arts and culture to the identity of the state?' 72% of respondents rate value highly (see Figure 20).

The mean score is 4.0 out of 5.0 and the Index Score is 74 out of 100.

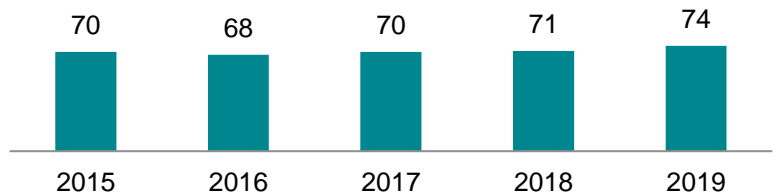
Figure 20: Overall Ratings
% of respondents



10.2 Trend Analysis

At 74, the Value Index Score is the highest score achieved and has increased 6 index points since 2016 (see Figure 21).

Figure 21: Trend Analysis
Value Index Score

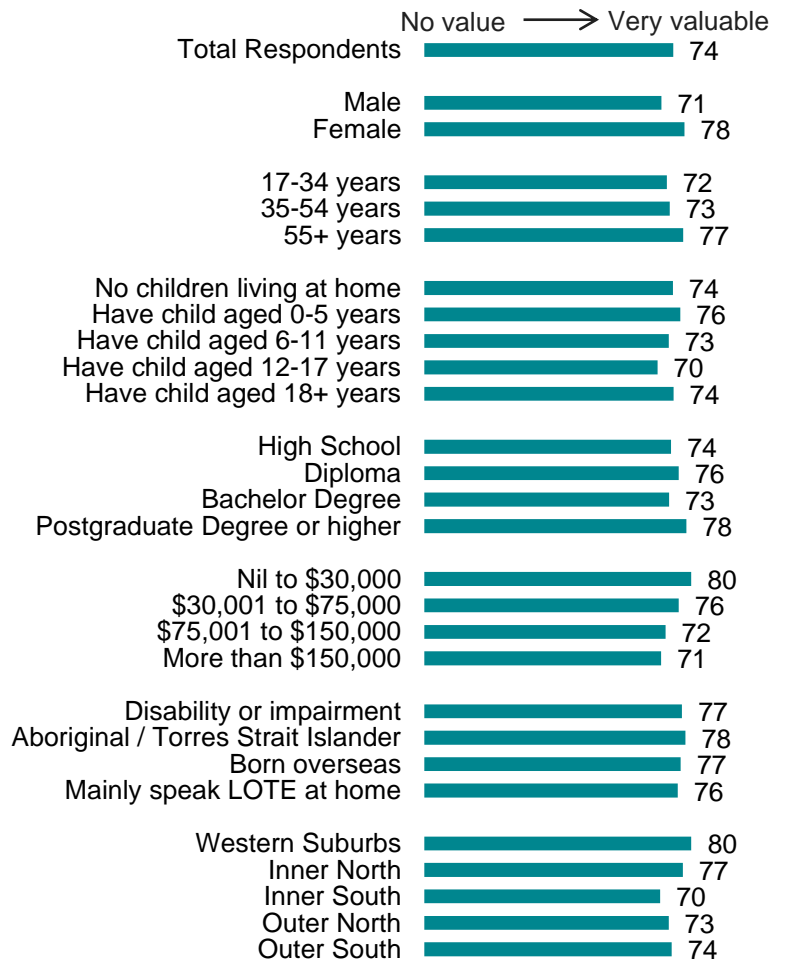


10.3 Community Variances

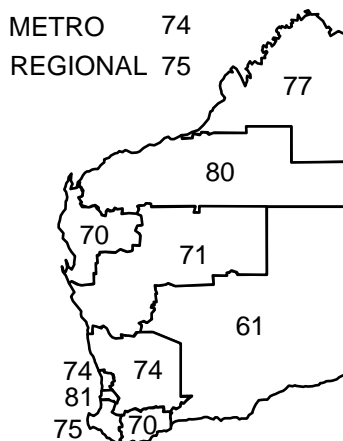
Perceived value is fairly consistent across the community with the highest scores seen in the Western Suburbs and among low income earners (see Figure 22).

The Value Index Score is highest in the Pilbara and Peel regions. Perceived value is lowest among respondents in Goldfields-Esperance (see Map 8).

Figure 22: Community Variances
Value Index Score



Map 8: Regional Variances
Value Index Score



Q5b. How valuable is the contribution of arts and culture to the identity of the state?

Base: All respondents, excludes unsure (n = 1249) NB: 5% of all respondents answered 'unsure'

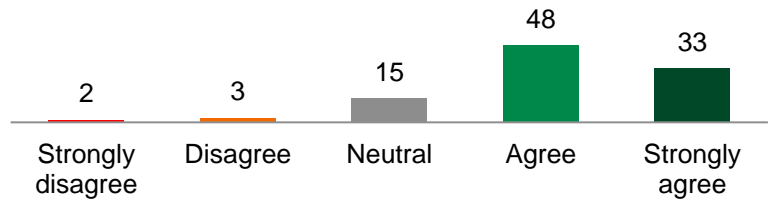
11 The arts make me feel good

11.1 Level of Agreement

81% of respondents agree or strongly agree with the statement “The arts make me feel good” (see Figure 23).

The mean score is 4.1 out of 5.0 and the Index Score is 77 out of 100.

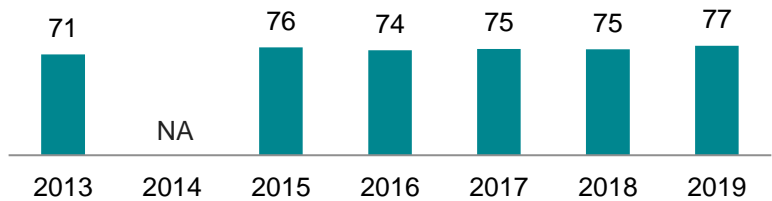
Figure 23: Overall Ratings
% of respondents



11.2 Trend Analysis

While 77 is the highest Agreement Index Score to date, it is fairly consistent with recent years (see Figure 24).

Figure 24: Trend Analysis
Agreement Index Score

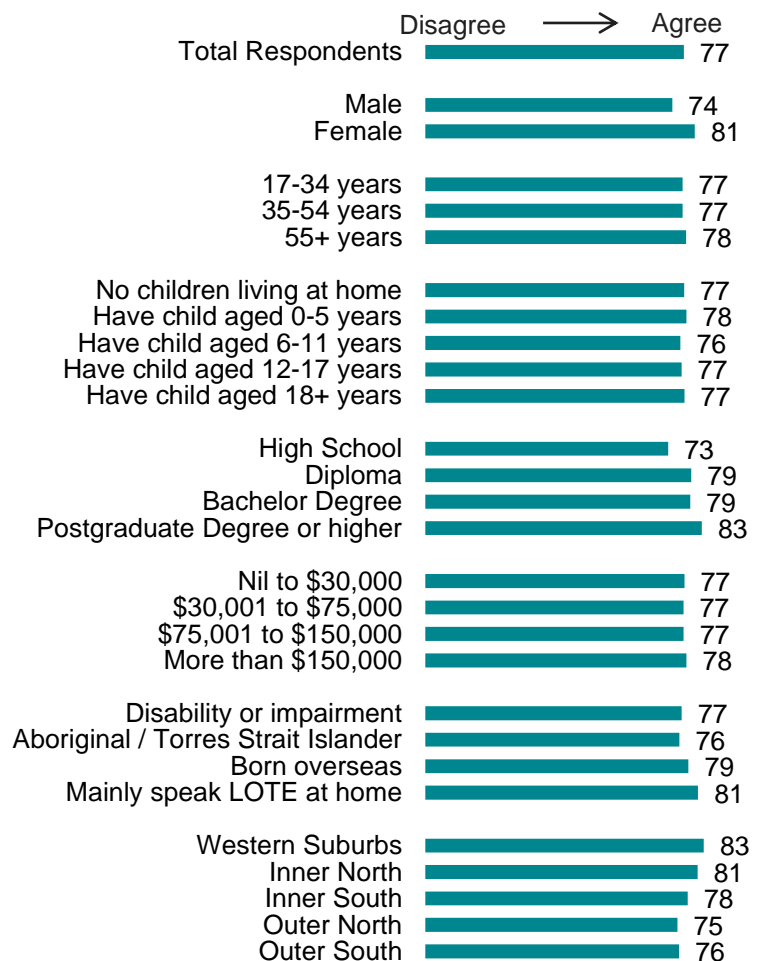


11.3 Community Variances

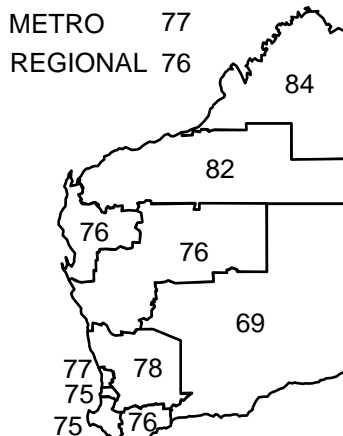
Level of agreement is higher among females, people with higher levels of education, those who speak a language other than English at home and residents in the Western Suburbs and inner north. It is lowest among males and people with high school level education (see Figure 25).

Kimberley and Pilbara respondents are most likely to agree and Goldfields-Esperance are least likely (see map 9).

Figure 25: Community Variances
Agreement Index Score



Map 9: Regional Variances
Agreement Index Score



Q3. How strongly do you agree or disagree with the following statements? The arts make me feel good.
Base: All respondents, excludes unsure (n = 1297) NB: 2% of all respondents answered 'unsure'

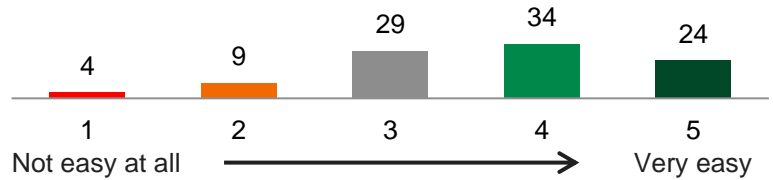
12 Ease of accessing or participating in arts and cultural activities in WA

12.1 Overall Ratings

58% of respondents believe it is easy to access or participate in arts and cultural activities in WA (rating ease of access in the top 2 boxes) (see Figure 26).

The mean score is 3.6 out of 5.0 and the Index Score is 66 out of 100.

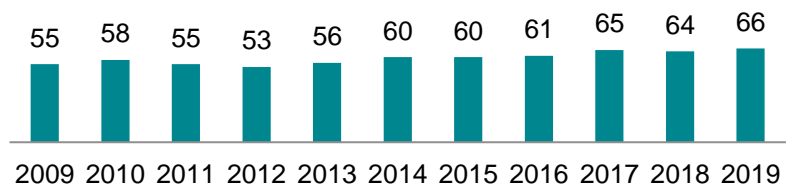
Figure 26: Overall Ratings
% of respondents



12.2 Trend Analysis

At 66, the Ease of Access Index Score is at its highest to date and stepping up from a low of 53 in 2012 (see Figure 27).

Figure 27: Trend Analysis
Ease of Access Index Score

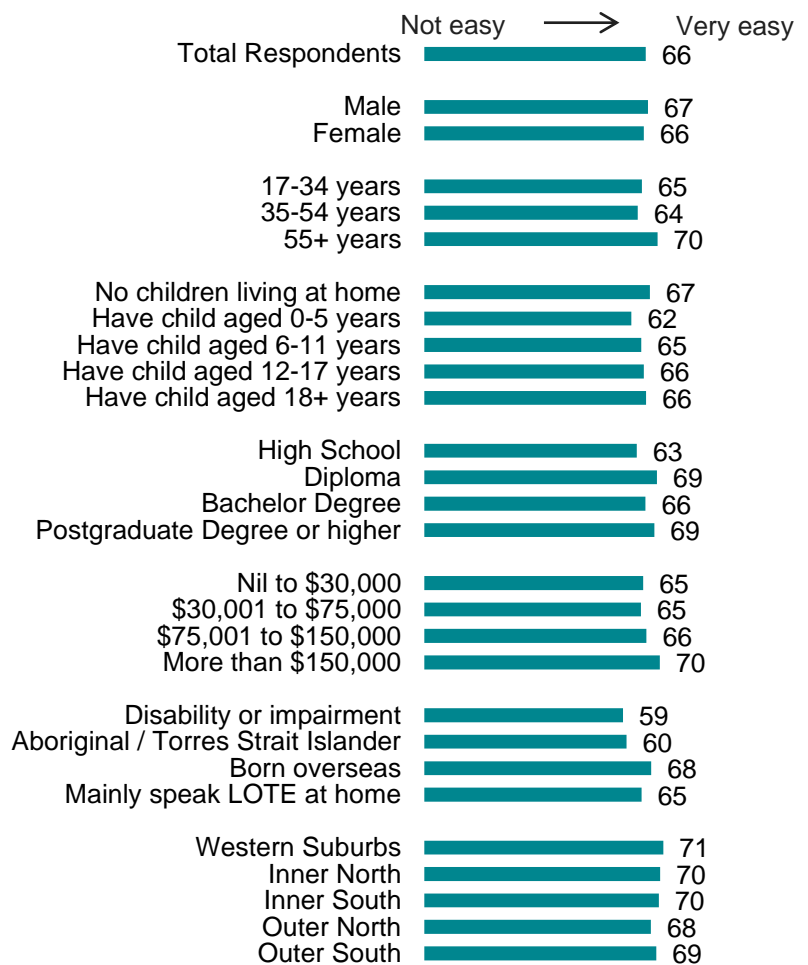


12.3 Community Variances

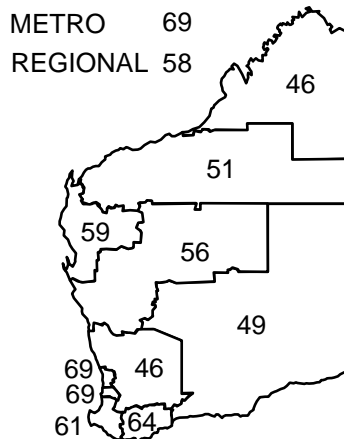
Ease of access is higher in the Western and inner metropolitan suburbs. It is also higher among older adults and high income earners.

Access is most difficult for those with a disability or impairment and Aboriginal and Torres Strait Islander people (see Figure 28). It also appears more difficult for those in the Kimberley, Wheatbelt and Goldfields-Esperance regions (see Map 10).

Figure 28: Community Variances
Ease of Access Index Score



Map 10: Regional Variances
Ease of Access Index Score



Q4a. How easy is it for you to access or participate in arts and cultural activities in WA?

Base: All respondents, excludes unsure (n = 1232) NB: 6% of all respondents answered 'unsure'

13 Frequency of attendance or participation in arts and cultural activities in WA

Annual participation in the arts is relatively steady with 82% of respondents having attended or participated in an arts or cultural activity over the past 12 months. Participation over summer has increased with 72% of respondents having attended or participated in an arts or cultural activity at least once and 47% attending or participating three times or more (see Figure 29).

Figure 29: Frequency of attending / participating in the arts

% of respondents	2013	2014	2015	2016	2017	2018	2019	Trend*
At least 3 times over summer	49	50	49	47	40	39	47	▲
At least once over summer	63	69	73	69	66	65	72	▲
At least once in past year	81	82	81	80	80	78	82	▲
At least once in past 2 years	86	89	87	91	87	85	85	=
Not at all in past 2 years	12	11	13	9	13	15	15	=

Q2. How many times did you attend or participate in arts and cultural activities over summer?

Q2a. When was the last time you attended or participated in an arts and cultural activity?

Base: All respondents, excludes unsure (n = 1280)

* Please note: 2013-2018 questions differ from 2019 due to adjusted timing of the study.

2013-2018 Q2. How many times have you attended or participated in an arts and cultural activity over the past 3 months?

2013-2018 Q2a. How many times have you attended or participated in an arts and cultural activity over the past 2 years?

The most popular frequency of participating in arts and cultural activities continues to be once every 2 to 3 months (25% of respondents), followed by once a month (23% of respondents) (see Figure 30).

Figure 30: Frequency of participating in the arts | detailed analysis

% of respondents	2015	2016	2017	2018	2019	Trend*
12+ times over summer (around once a week or more)	11	5	5	5	7	=
5-11 times over summer (around 2 or 3 times a month)	17	19	15	13	17	=
3-4 times over summer (around once a month)	22	23	20	21	23	=
1-2 times over summer (around once every 2 to 3 months)	23	23	26	27	25	=
2+ times over past 2 years	8	11	14	13	10	▼
1 time over the past 2 years	6	11	7	7	3	▼
Not at all in the past 2 years	12	9	13	15	15	=

Q2. How many times did you attend or participate in arts and cultural activities over summer?

Q2a. When was the last time you attended or participated in an arts and cultural activity?

Base: All respondents, excludes unsure (n = 1280)

* Please note: 2013-2018 questions differ from 2019 due to adjusted timing of the study.

2013-2018 Q2. How many times have you attended or participated in an arts and cultural activity over the past 3 months?

2013-2018 Q2a. How many times have you attended or participated in an arts and cultural activity over the past 2 years?

Frequent participation (attended 3 or more times over summer) is more common among Western Suburbs residents, those with higher levels of education, those on higher incomes and people of Aboriginal and Torres Strait Islander background (see Table 2).

Table 2: Frequency of participating in the arts | community variances

% of respondents	At least 3 times over summer	At least once over summer	At least once in the past year	At least once in the past 2 years	Not at all in the past 2 years
Total respondents	47%	72%	82%	85%	15%
Male	43%	70%	78%	82%	18%
Female	52%	74%	85%	89%	11%
17-34 years	51%	71%	82%	86%	14%
35-54 years	46%	74%	83%	87%	13%
55+ years	45%	71%	79%	82%	18%
No children living at home	46%	71%	80%	83%	17%
Have child aged 0-5	50%	78%	90%	93%	7%
Have child aged 6-11	51%	76%	86%	90%	10%
Have child aged 12-17	47%	75%	84%	89%	11%
Have child aged 18+	49%	74%	85%	88%	12%
High School	34%	57%	70%	76%	24%
Diploma	50%	78%	88%	91%	9%
Bachelor Degree	54%	79%	86%	89%	11%
Postgraduate Degree or higher	64%	87%	94%	95%	5%
Nil to \$30,000	30%	55%	72%	76%	24%
\$30,001 to \$75,000	46%	70%	79%	83%	17%
\$75,001 to \$150,000	52%	77%	86%	88%	12%
More than \$150,000	62%	87%	92%	96%	4%
Disability or impairment	44%	67%	75%	79%	21%
Aboriginal / Torres Strait Islander	62%	81%	85%	88%	12%
Born overseas	49%	76%	85%	88%	12%
Mainly speak LOTE at home	48%	68%	78%	85%	15%
Metro	50%	74%	83%	85%	15%
Regional	40%	67%	79%	84%	16%
Western Suburbs	69%	92%	97%	97%	3%
Inner North	55%	78%	86%	88%	12%
Inner South	60%	75%	86%	88%	12%
Outer North	44%	73%	82%	86%	14%
Outer South	46%	69%	77%	81%	19%
Gascoyne	30%	64%	78%	78%	22%
Goldfields-Esperance	31%	59%	74%	78%	22%
Great Southern	49%	68%	76%	87%	13%
Kimberley	29%	59%	83%	83%	17%
Mid West	42%	67%	75%	81%	19%
Peel	32%	61%	77%	82%	18%
Perth	50%	74%	83%	85%	15%
Pilbara	39%	70%	72%	81%	19%
South West	47%	77%	88%	90%	10%
Wheatbelt	38%	56%	73%	81%	19%

Q2. How many times did you attend or participate in arts and cultural activities over summer?

Q2a. When was the last time you attended or participated in an arts and cultural activity?

Base: All respondents, excludes unsure (n = 1280)

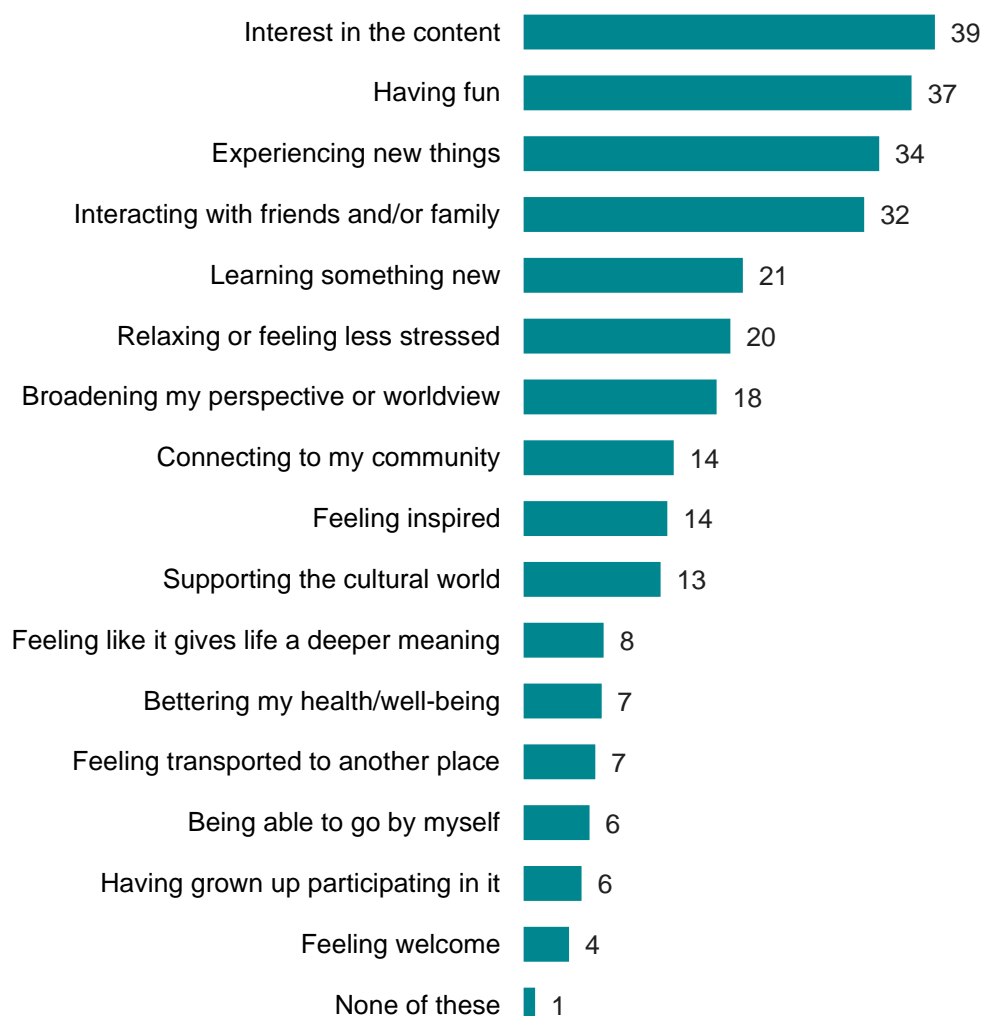
14 Motivations for participating in arts and cultural activities

Across metropolitan and regional areas, the top four motivators for participating in arts and cultural activities were interest in content, fun, experiencing new things and interacting with friends and family (see Figure 30).

Fun is the number one motivator for younger adults. After the age of 35, interest in content becomes the main motivator. Having fun is the second highest motivator among 35-54 year olds and the fourth highest motivator among those aged 55 years or older.

Among parents with young children (0 to 5 years old), the number one motivator is experiencing new things, followed by interacting with friends and family, and having fun.

Figure 30: **Top motivators for participating in art and cultural activities**
% of respondents



Q3. **What motivates you to participate in art and cultural activities?** Please select your top 3 motivators from the following list.

Base: All respondents, excludes unsure (n = 1175)

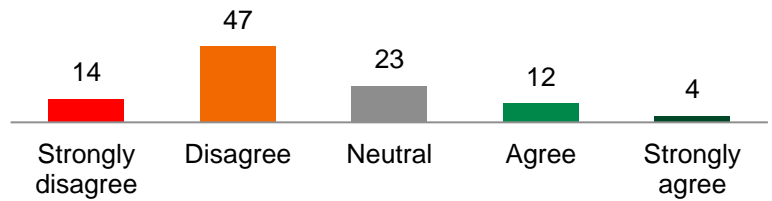
15 Few people agree that arts companies should rely on ticket sales alone

15.1 Level of Agreement

Only 16% of respondents agree with the statement “all theatre, ballet and opera companies and public art galleries, etc should rely on their tickets sales alone”. 62% disagree with this statement (see Figure 31).

The mean score is 2.4 out of 5.0 and the Index Score is 36 out of 100.

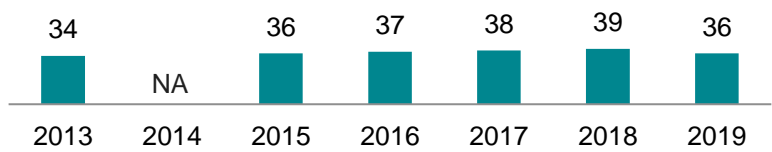
Figure 31: Overall Ratings
% of respondents



15.2 Trend Analysis

The Agreement Index Score has dropped from a high of 39 last year (see Figure 32).

Figure 32: Trend Analysis
Agreement Index Score

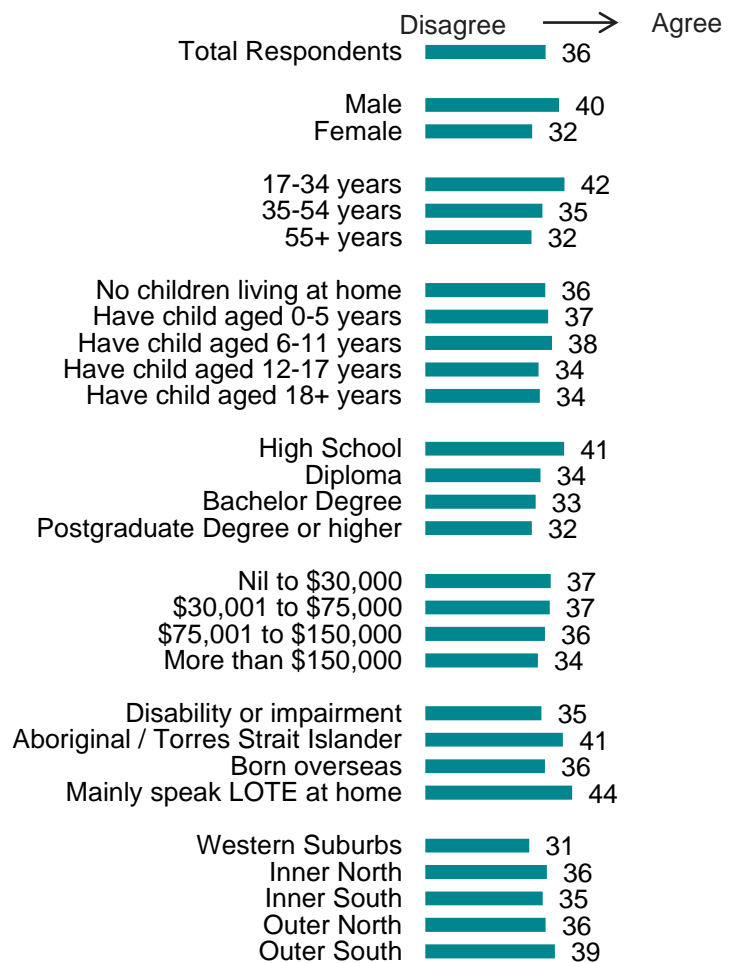


15.3 Community Variances

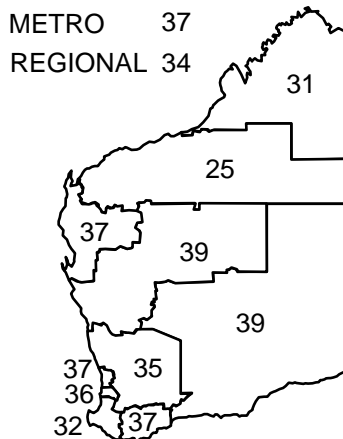
Females, older adults and people in the Western Suburbs are most likely to think arts companies should receive other forms of financial support. The Agreement Index Score appears to decline with level of education and income.

Agreement is highest among males, younger adults, people with a high school diploma, those who speak a language other than English at home and Aboriginal and Torres Strait Islander people (see Figure 33).

Figure 33: Community Variances
Agreement Index Score



Map 11: Regional Variances
Agreement Index Score



Q4. How strongly do you agree or disagree with the following statements? All theatre, ballet and opera companies and public art galleries etc should rely on their tickets sales alone.

Base: All respondents, excludes unsure (n = 1234) NB: 6% of all respondents answered 'unsure'

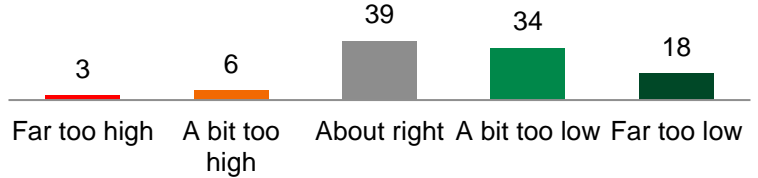
16 Perceptions of WA Government's allocation of just under \$2.21 per person per week for arts and cultural activities, services & facilities

16.1 Level of Agreement

When asked whether \$2.21 per person per week in allocation by WA Government for arts and cultural activities was too low, about right or too high, 52% thought it was too low (see Figure 34).

The mean score was 3.6 out of 5.0 and the Index Score was 64.

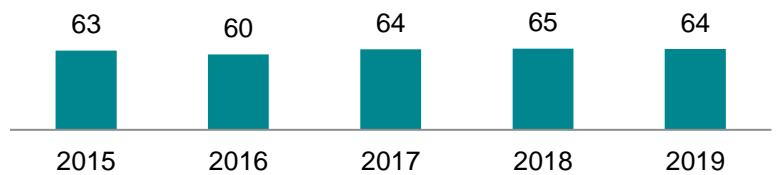
Figure 34: Overall Ratings
% of respondents



16.2 Trend Analysis

The Funding Allocation Index Score has remained steady (see Figure 35). On average, respondents give a rating between 'about right' and 'a bit too low'.

Figure 35: Trend Analysis*
Funding Allocation Index Score



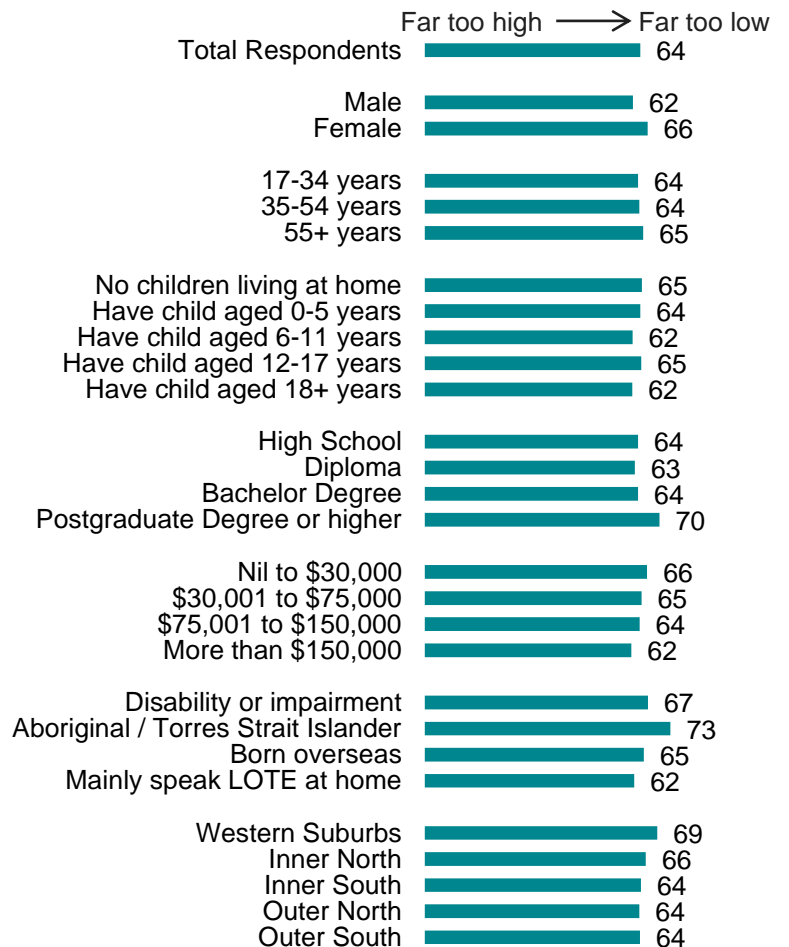
*Please note: 2015 and 2016 were based on a \$1 figure (calculated on "Arts" activities alone) compared with around \$2 per week spending for 2017, 2018 and 2019 (calculated on "Arts and Cultural" activities).

16.3 Community Variances

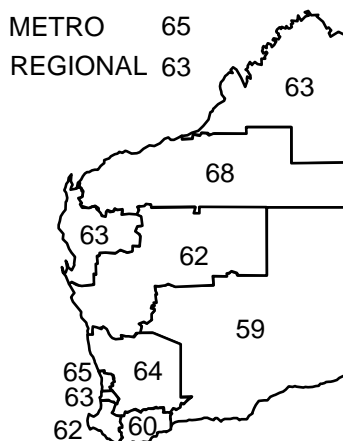
Respondents with higher levels of education, Aboriginal and Torres Strait Islander people and those living in the Western Suburbs are more likely to feel that \$2.21 per person per week in arts allocation is too low (see Figure 36).

Males, people with children aged 6 to 11 years and 18 years and older, high income earners and people who speak a language other than English at home are the least likely to feel that arts funding is too low.

Figure 36: Community Variances
Funding Allocation Index Score



Map 12: Regional Variances
Funding Allocation Index Score



Q6a¹. About \$2.21 per person per week is allocated by WA Government for arts and cultural activities, services and facilities in WA. Do you consider this amount to be too low, about right or too high?

Base: All respondents, excludes unsure (n = 1122) NB: 15% of all respondents answered 'unsure'

1. Total Western Australian Government funding of \$114.91 per person per year towards Arts and Cultural activities as reported in the Meeting of Cultural Ministers Statistic Working Group, Cultural Funding by Government Survey 2017-18. Population data from ABS Cat. 3101.0 - Australian Demographic Statistics, Jun 2016: www.abs.gov.au/ausstats/abs@.nsf/mf/3101.0

17 Willingness to pay more to improve access to arts and culture in WA

77% of respondents would be willing to pay more to improve access to arts and culture in WA. An increasing proportion would be willing to pay between \$2.01 and \$10 more per week, while the proportion not willing to pay more has decreased (see Figure 37).

Figure 37: Willingness to pay more to improve access to arts and culture in WA

	2015*	2016*	2017	2018	2019	Trend
Not willing to pay any more	25	29	28	27	23	▼
Willing to pay \$0.01 to \$2 more per week	44	46	32	33	32	=
Willing to pay \$2.01 to \$10 more per week	29	24	36	37	40	▲
Willing to pay over \$10 more per week	2	1	4	3	4	=

Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA?

Base: All respondents, excludes unsure (n = 1091) NB: 17% of all respondents answered 'unsure'

* Please note: 2015 and 2016 responses based on a \$1 per week public contribution.

People of Aboriginal and Torres Strait Islander background are the group most willing to pay over \$10 more per week, as well as being the most willing to pay between \$2.01 to \$10 more per week.

People from metropolitan areas are more willing to pay between \$2.01 to \$10 more per week than people from regional areas overall. Those from the Inner North and Western Suburbs are more willing to pay between \$2.01 to \$10 more per week than people from other metropolitan areas.

Table 4: **Willingness to pay more to improve access to arts and culture in WA | community variances**

% of respondents	None	\$0.01-\$2 more	\$2.01-\$10 more	Over \$10 more
Total respondents	23%	32%	40%	4%
Male	26%	30%	39%	4%
Female	20%	35%	40%	4%
17-34 years	20%	35%	38%	6%
35-54 years	24%	32%	39%	4%
55+ years	26%	30%	41%	3%
No children living at home	24%	33%	39%	4%
Have child aged 0-5	19%	37%	37%	8%
Have child aged 6-11	26%	31%	39%	3%
Have child aged 12-17	25%	26%	46%	4%
Have child aged 18+	28%	32%	35%	5%
High School	28%	35%	32%	5%
Diploma	25%	29%	43%	2%
Bachelor Degree	21%	34%	41%	3%
Postgraduate Degree or higher	13%	29%	50%	8%
Nil to \$30,000	29%	28%	38%	4%
\$30,001 to \$75,000	25%	30%	42%	4%
\$75,001 to \$150,000	20%	34%	40%	6%
More than \$150,000	19%	41%	39%	1%
Disability or impairment	25%	30%	40%	5%
Aboriginal / Torres Strait Islander	2%	20%	61%	16%
Born overseas	25%	30%	40%	5%
Mainly speak LOTE at home	14%	29%	52%	5%
Metro	22%	33%	41%	4%
Regional	29%	32%	35%	5%
Western Suburbs	19%	30%	48%	3%
Inner North	15%	26%	52%	6%
Inner South	22%	36%	37%	5%
Outer North	26%	35%	35%	4%
Outer South	21%	34%	42%	3%
Gascoyne	22%	25%	50%	4%
Goldfields-Esperance	36%	23%	39%	2%
Great Southern	27%	38%	30%	5%
Kimberley	13%	39%	48%	0%
Mid West	31%	24%	45%	0%
Peel	35%	28%	32%	5%
Perth	22%	33%	41%	4%
Pilbara	9%	47%	37%	6%
South West	34%	29%	31%	6%
Wheatbelt	21%	43%	28%	7%

Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA?

Base: All respondents, excludes unsure (n = 1091) NB: 17% of all respondents answered 'unsure'

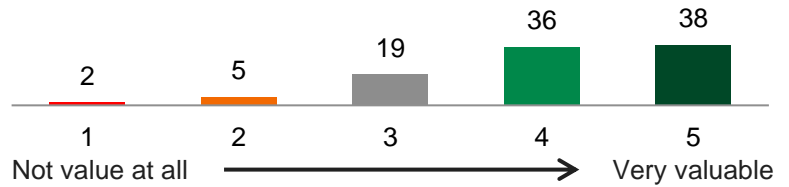
18 Value of WA film and television industry

18.1 Overall Ratings

When asked 'how valuable do you think the WA film and television industry is to the community', 74% rate value highly (see Figure 38).

The mean score is 4.0 out of 5.0 and the Index Score is 76 out of 100.

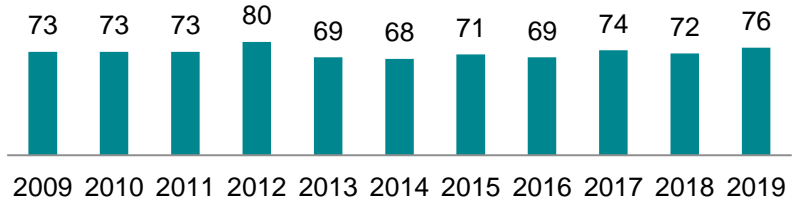
Figure 38: Overall Ratings
% of respondents



18.2 Trend Analysis

The Value Index Score has fluctuated between 68 and 80 over the past 10 years. At 76, it is currently sitting at its second highest score to date (see Figure 39).

Figure 39: Trend Analysis
Value Index Score

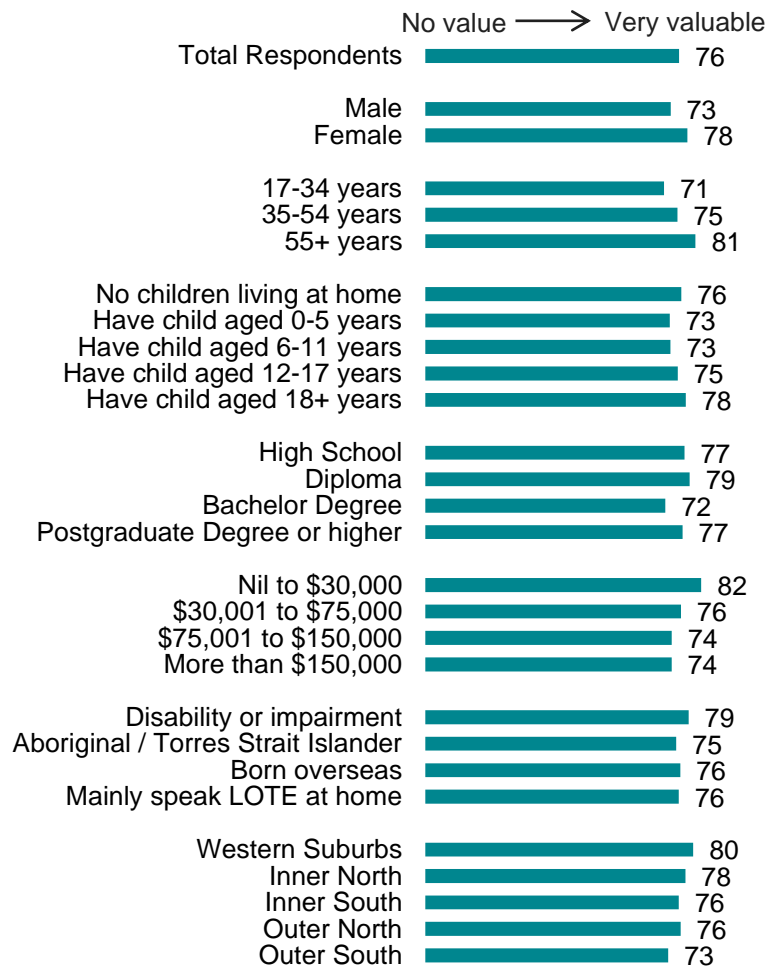


18.3 Community Variances

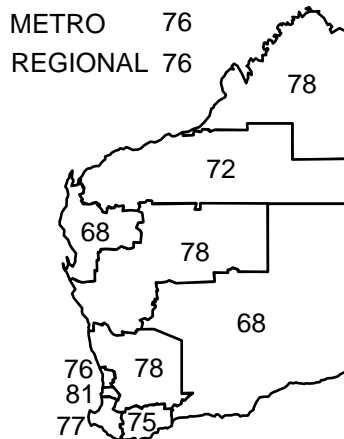
Perceived value is highest among low income earners as well as people in the Western Suburbs. It also appears to increase with age and decrease with level of income (see Figure 40).

Regionally, perceived value is highest among Peel respondents and lowest in the Gascoyne and Goldfields-Esperance (see Map 13).

Figure 40: Community Variances
Value Index Score



Map 13: Regional Variances
Value Index Score



Q7a. How valuable do you think the Western Australian film and television industry is to the community?

Base: All respondents, excludes unsure (n = 1266) NB: 4% of all respondents answered 'unsure'

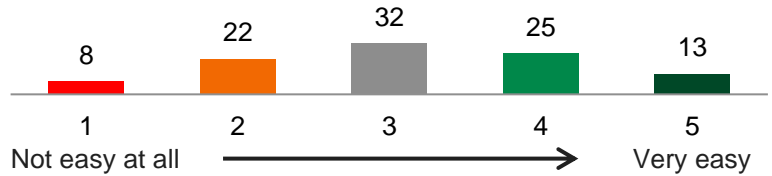
19 Accessibility of WA film and television productions

19.1 Overall Ratings

When asked “how easy is it for you to access Western Australian produced film and television productions?” 38% rated ease of access highly (see Figure 41).

The mean score is 3.1 out of 5.0 and the Index Score is 53 out of 100.

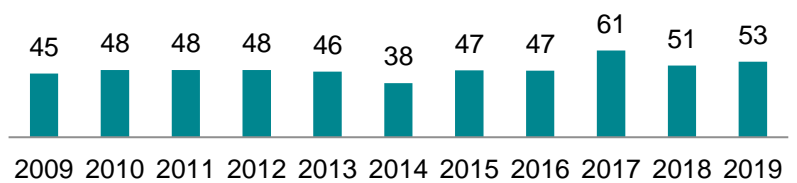
Figure 41: Overall Ratings
% of respondents



19.2 Trend Analysis

The Ease of Access Index Score is on par with last year after a high of 61 in 2017. At 53, however, it remains higher than earlier years (see Figure 42).

Figure 42: Trend Analysis
Ease of Access Index Score

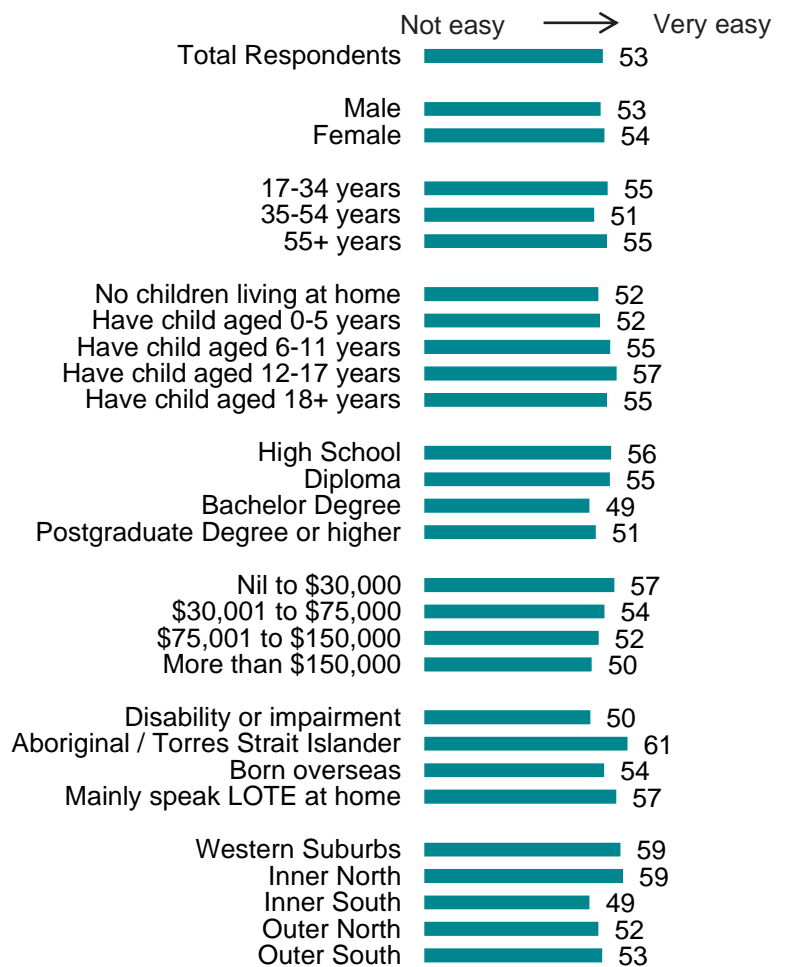


19.3 Community Variances

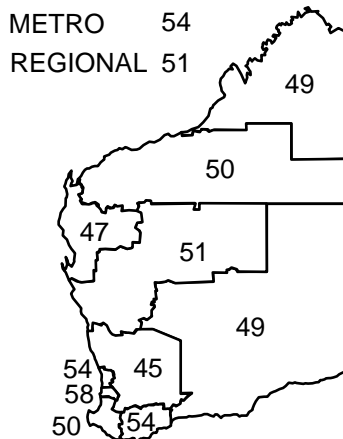
Ease of access is higher among lower income earners and lower levels of education. It is also higher in the Western Suburbs and Inner North (see Figure 43).

Across the regions, ease of access appears highest in Peel and lowest in the Wheatbelt, Gascoyne and Goldfields-Esperance (see Map 14).

Figure 43: Community Variances
Ease of Access Index Score



Map 14: Regional Variances
Ease of Access Index Score



Q7b. How easy is it for you to access Western Australian produced film and television productions?

Base: All respondents, excludes unsure (n = 1163) NB: 12% of all respondents answered 'unsure'

20 Appendix 1 | Survey Questions

Questions

- Q1. The following study is being conducted on behalf of Culture and the Arts (WA), a division of the Department of Local Government, Sport and Cultural Industries. Do you or anyone in your household work for Culture and the Arts (WA) or an agency or organisation that is funded by them?
- Q2. Arts and cultural activities includes a range of activities such as the cinema, music, theatre, dance, visual arts, opera, festivals, libraries, galleries, museums, archives and community cultural events. How many times did you attend or participate in arts and cultural activities over summer?
- Q2a. When was the last time you attended or participated in an arts and cultural activity?
- Q3. What motivates you to participate in art and cultural activities? Please select your top 3 motivators from the following list.
- Q4. How strongly do you agree or disagree with the following statements? RANDOMISE ORDER
- The Western Australian Government should invest in arts and cultural activities to ensure they are available to the public
 - It is important for school children to have access to learn music, arts and crafts, writing, drama, media training etc, as part of their education
 - The arts make me feel good
 - All theatre, ballet and opera companies and public art galleries etc should rely on their tickets sales alone
 - The arts only helps those people who participate, not the broader community
- Q4a. How easy is it for you to access or participate in arts and cultural activities in WA? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".
- Q4b. How valuable is the role of arts and culture in your life? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q4c. How valuable do you think the role of arts and culture is in the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q5a. The Department of Local Government, Sport and Cultural Industries invests in arts and cultural activities to deliver a number of benefits to the Western Australian community. How valuable is the contribution of arts and culture to your sense of community in WA? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q5b. How valuable is the contribution of arts and culture to the identity of the state? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q6a. About \$2.21 per person, per week is allocated by WA Government for arts and cultural activities, services and facilities in WA. Do you consider this amount to be: Far too high; A bit too high; About right; A bit too low; Far too low; or, Unsure
- Q6b. Please indicate how much more you would be prepared to pay per week, if anything, to expand provision of or increase access to arts and culture in WA? Nothing; \$0.01 - \$1.00; \$1.01 - \$2.00; \$2.01 - \$5.00; \$5.01 - \$10.00; \$10.01 - \$20.00; \$20.01 +; Unsure
- Q7a. The West Australian Government, through Screenwest, provides financial support to help individuals and companies make film, television and digital media in Western Australia. How valuable do you think the Western Australian film and television industry is to the community? Please use a scale of 1 to 5, where '1' is "no value at all" and '5' is "very valuable".
- Q7b. How easy is it for you to access Western Australian produced film and television productions? Please use a scale of 1 to 5, where '1' is "not easy at all" and '5' is "very easy".

Demographics

- D1. Age
- D2. Gender
- D3. Residential postcode
- D4. Region (if Regional WA)
- D5. Do you have any children living at home aged: 0-5 years; 6-11 years; 12-17 years; 18+ years; No children; or, Refused
- D6. What is your highest level of education? High School Leaving Certificate; Diploma or Advanced Diploma; Bachelor Degree; Postgraduate Degree or higher; Other; or, Refused
- D7. What is your combined household income before tax? Nil to \$30,000; \$30,001 to \$75,000; \$75,001 to \$150,000; More than \$150,000; Refused
- D8. Do you, or anyone in your household, identify with the following groups: Person with a disability or impairment; Aboriginal and / or Torres Strait Islander; Born overseas; Mainly speak a language other than English at home; None of the above; or, Refused